Celonis Process Designer

Quick Guide

March 2024

Process Designer
Topics

Beginner
Test basic functions

- Search process
- Model process
- Select views
- Store roles
- Release process

Advanced
Apply functions

- Build a Process House
- Make process changes
- Store information and objects
- Design an organigram

Expert
Learn more functions

- Create variants
- Apply filters/stereotypes
- Create process maps
- Mapp end-to-end processes
- Assign permissions
- Define Customer Journeys

Process Designer
Topics

| First Steps | Test Environment | **Experience** | Requirements | Start Trial |

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Beginner
Search Process

Log In

Log in with access data received by mail

Get familiar with the work area

Navigate to one of the following search functions

OPTION 1
Enter search terms

Go to Header

Enter term (use AND/OR)

Filter by field (option)

Select searched term in list

Open link in Detail Content
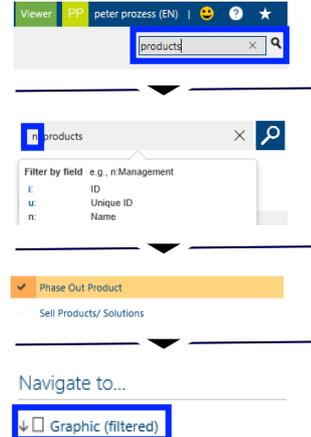
OPTION 2
Search list content

Navigate to PROCESSES in list view

Click on magnifier icon

Search by content
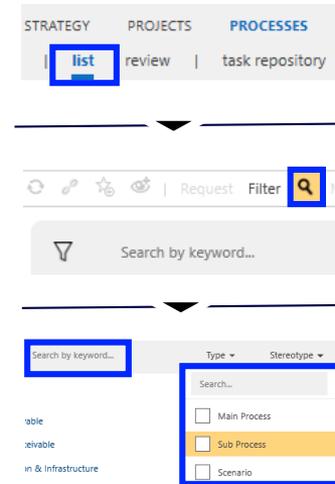
OPTION 3
Select scope filter

Set Scope filter(s) in Header

See appropriate processes

Non-applicable processes are greyed out
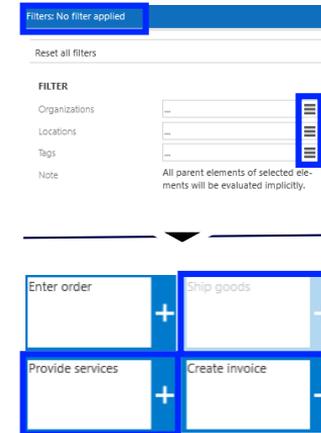
OPTION 4
Enter by role
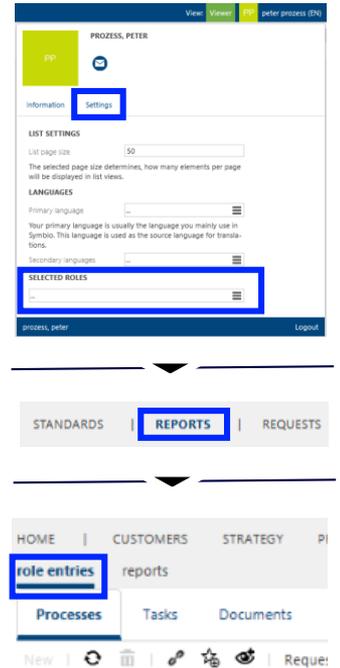
Beginner
Model Process

STEP 1
Log In

Log in with access data received by mail

Get familiar with the work area

See user information in Header

STEP 2
Start editing

In 'Viewer' mode, only released processes are shown

Click on 'Viewer' to change to 'Editor' mode

Navigate to PROCESSES to create a new process
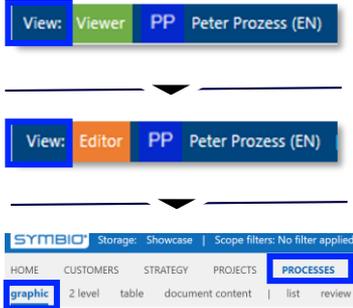
STEP 3
Create process

Select Main Process in Navigation Tree

Create Sub Process (BPMN2.0-Diagram)

Start modelling in Main Content
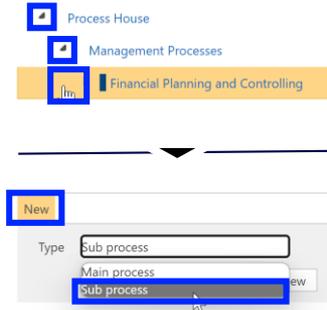
STEP 4
Model process

STEP 5
Store information

Add further information in Detail Content

Update by refresh button
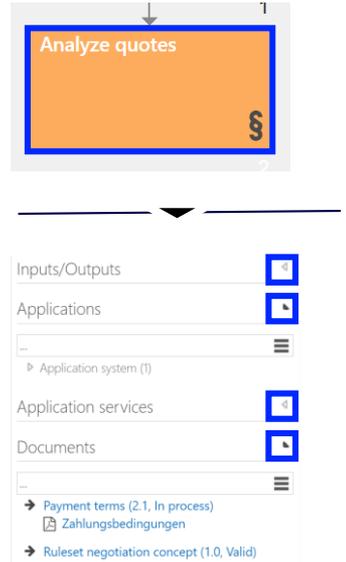
Beginner
Select Views

STEP 1
Log In

Log in with access data received by mail

Get familiar with the work area

See user information in Header
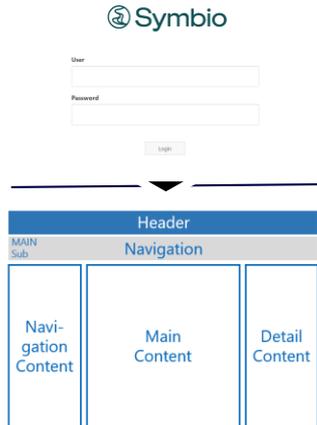
STEP 2
Navigate to process
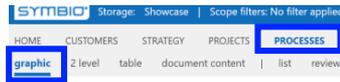
OR

STEP 3
Select view

Automated views can be selected

Different views show the process on a various perspective
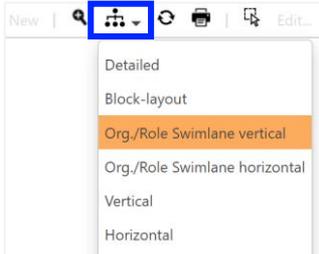
STEP 4
Get information
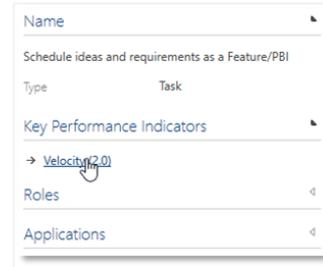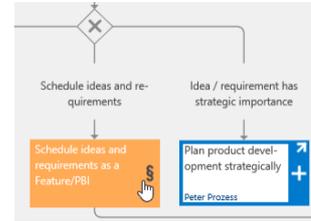
STEP 5
Work with the view

Select to get the process view as pdf

Select to get the process manual

Print out the selected view
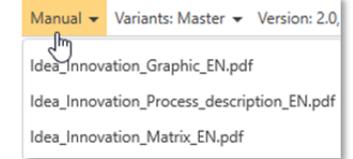
OR
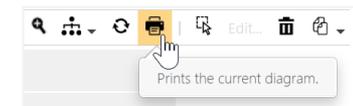
Beginner
Store Roles

STEP 1
Log In

Log in with access data received by mail

Get familiar with the work area

See user information in Header
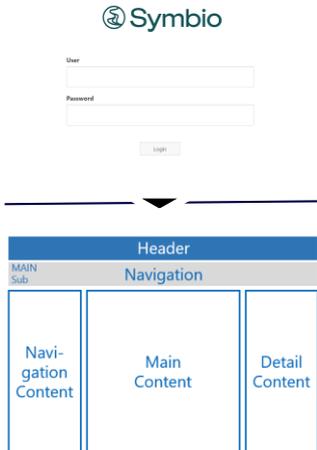
STEP 2
Start editing

In 'Viewer' mode, only released processes are shown

Click on 'Viewer' to change to 'Editor' mode

Navigate to PROCESSES to create a new process
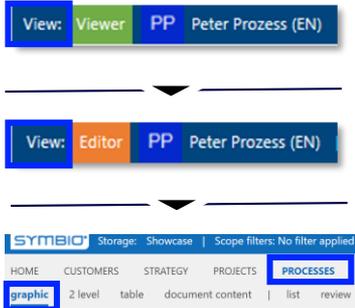
STEP 3
Create roles

Detailing Roles is done in the Detail Content
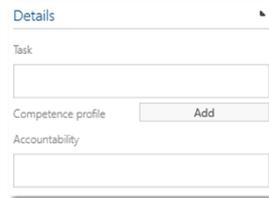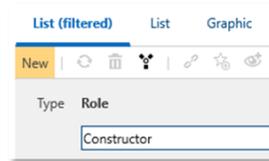
STEP 4
Apply known roles

A swimlane is automatically generated for each Responsible (R) role
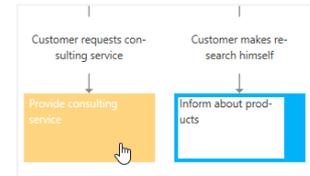
STEP 5
Apply unknown roles
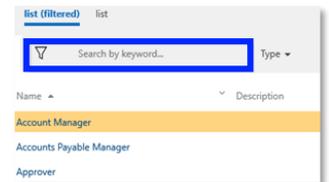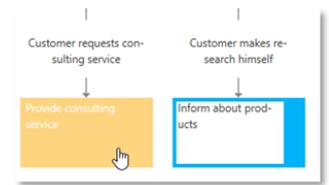
Beginner
Release Process

STEP 1
Log In

Model Process

Store Roles

STEP 2
Apply participants

By including a Quality Manager, the process will be first released by him

Responsible is always the last one releasing the process

- Sell Products/ Solutions
  - Sell product in store
  - Understand Market/Customer

Responsible
fre
Freigeber, Frederike

STEP 3
Initiate release cycle

Go to Version dropdown in Toolbar of Main Content

Select 'Change state'

Version: 0.1, In process   Permissions

Sell product in store (0.1, In process)

Create version

Remove current version

Dependencies

Change state...

Opens the release dialog and shows the available values for changing the state.
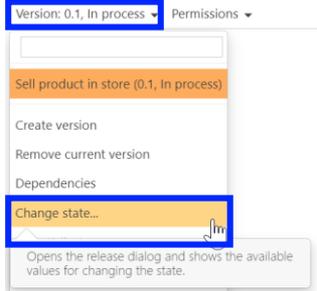
STEP 4
Check mandatory fields

PARTICIPANTS

Responsible → Freigeber, Frederike
Author → Manager, Paul
Note   The author was set. Only arch
Quality manager ...

✔ All mandatory attributes have to be maintained
✔ Diagram has to start with a start event
✔ Predecessor of OR rules has to be a task
✔ Predecessor of XOR rules has to be a task
✔ Successor of OR rules has to be a condition
✔ Successor of XOR rules has to be a condition
✔ Diagram cannot contain unconnected elements
⚠ Diagram has to end with an end event

Invalid end element: Task "Provide consulting service"
Invalid end element: Task "Inform about products"

REASON FOR REVISION

Type of change   Add...

Reason for revision   B I U ≡ ≔
Mandatory!

STEP 5
Release process

In case a Quality Manager is set, the state first changes into "Ready for QA"

SETTINGS

Version   0.1
State   In process

Choose...
In process
Ready for release

OK

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Advanced
Build a Process House

STEP 1
Log In

Log in with access data received by mail

Get familiar with the work area

See user information in Header

STEP 2
Start editing

In 'Viewer' mode, only released processes are shown

Click on 'Viewer' to change to 'Editor' mode

Navigate to PROCESSES to create a new process
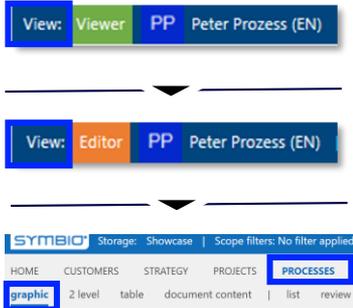
STEP 3
Create first levels
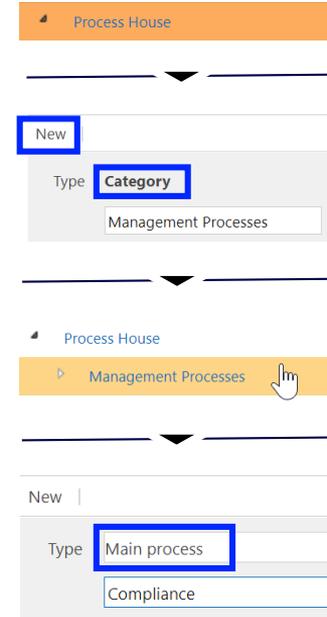
STEP 4
Store information
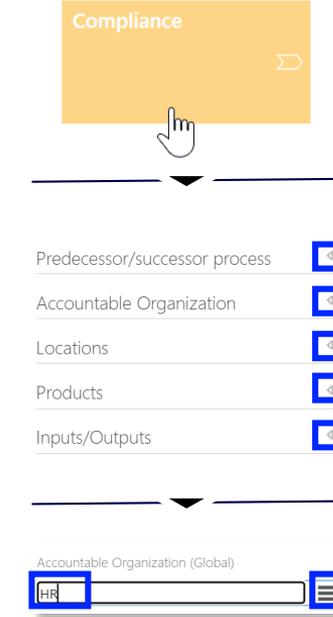
STEP 5
Release Process House

Release process Step 3-5

Make process changes

STEP 1

Log In

Model Process

Store Roles

STEP 2

Create new version
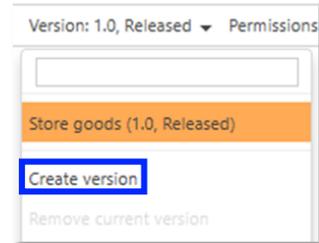
STEP 3

Select multiple objects

Highlight process flow objects that should be modified

STEP 4

Modify process flow

Copy/move selected objects (Feature only available after activation)

Delete selected objects

Add further objects

Swap paths for better layout
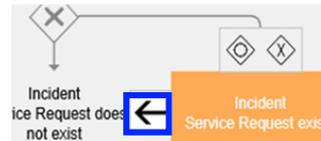
STEP 5

Create favorite/link

Define a favorite or subscribe to process to be informed by mail in case of changes

Create a link to share process with other users
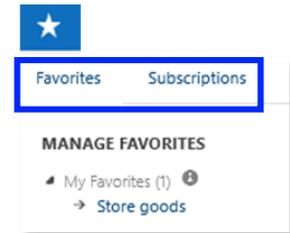
Advanced
Store information and objects

STEP 1
Log In

Log in with access data received by mail

Get familiar with the work area

See user information in Header

STEP 2
Start editing

In 'Viewer' mode, only released processes are shown

Click on 'Viewer' to change to 'Editor' mode

Navigate to SYSTEMS
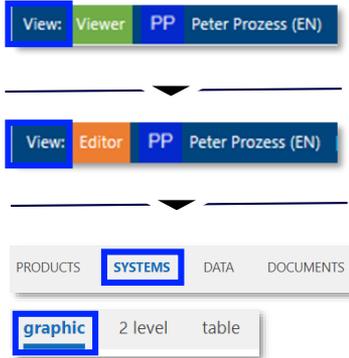
STEP 3
Set object architecture

Define further object architectures for DOCUMENTS, RISKS, REQUIREMENTS etc.
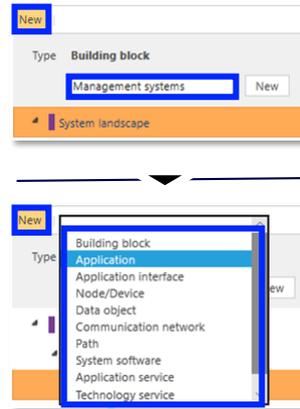
STEP 4
Define listed objects

Create further objects in a list like roles, locations etc.

Consolidate objects if they are redundant
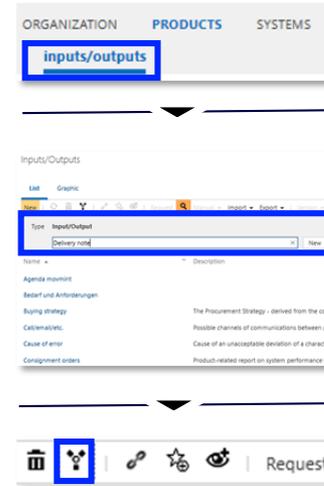
STEP 5
Release objects

Release process
Step 3-5

Advanced
Design an organigram

STEP 1
Log In

Log in with access data received by mail

Get familiar with the work area

See user information in Header

STEP 2
Start editing

In 'Viewer' mode, only released processes are shown

Click on 'Viewer' to change to 'Editor' mode

Navigate to ORGANIZATION

STEP 3
Set up org structure

STEP 4
Store information

STEP 5
Release organigram

**Release process
Step 3-5**

Process Designer
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Expert
Create variants
Prerequisite: Variant options are available (created by Admin)

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Log In	**Create variant**	**Set up localizations**	**Delocalize**	**Update variant**

STEP 1 — Log In

Model Process

Store Roles

STEP 2 — Create variant

Select variant via hamburger button

Go back to Toolbar
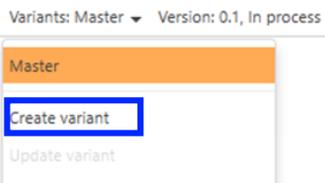
STEP 3 — Set up localizations

Mark task to localize a single element OR

Localize entire process flow
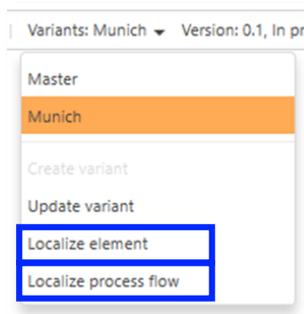
STEP 4 — Delocalize

Go to 'Localization reasons' in Detail Content

Click button to delocalize task or process
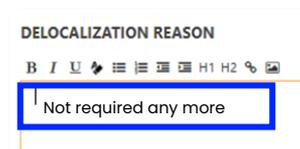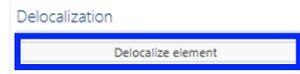
STEP 5 — Update variant

Update only if Master has been changed

Localized element or process flow remain unchanged
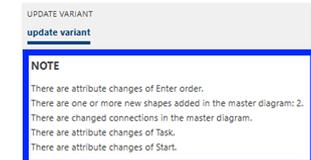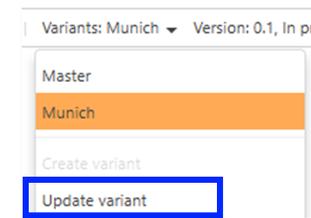
Expert

Apply filters/stereotypes

Prerequisite: Stereotypes and Tags are available (created by Admin)

STEP 1	STEP 2	STEP 3	STEP 4: Option 1	STEP 4: Option 2
Log In	**Set up Scope filters**	**Apply Scope filters**	**Set up stereotypes**	**Set task type/marker**

STEP 1 — Log In

Model Process

Store Roles

STEP 2 — Set up Scope filters

Select Scope filter options via hamburger button

If no filters are set, process or object are displayed in any query
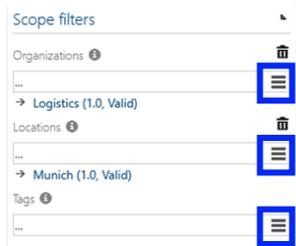
STEP 3 — Apply Scope filters

Set filter(s) in Header

Non-applicable processes are greyed out
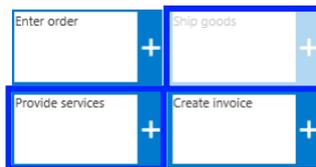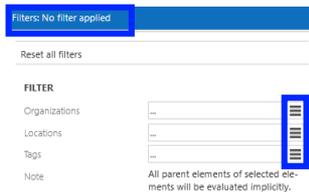
STEP 4: Option 1 — Set up stereotypes

Go to 'Localization reasons' in Detail Content

Click button to delocalize task or process
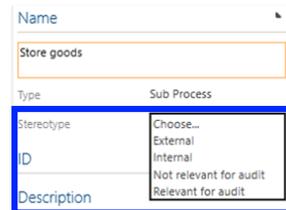
STEP 4: Option 2 — Set task type/marker

Go to Detail Content

Choose task type and/or task marker from dropdown

See BPMN2.0 icon on task (only available after feature activation)
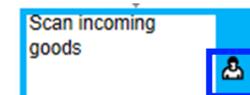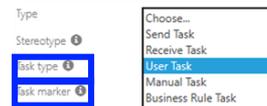
Expert
Create process maps

STEP 1
Log In

Build a Process House

Log in with access data received by mail

Model Process House

Go to Navigation Content

STEP 2
Open editor

STEP 3
Select objects

Drag&drop from Stencil Pool to Draw Area
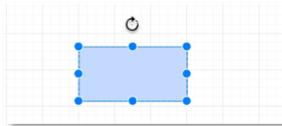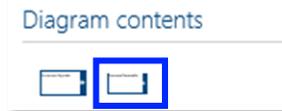
STEP 4
Edit objects

Edit in Draw Settings area and in right mouse button menu
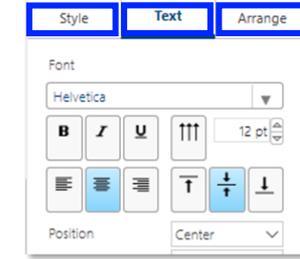
STEP 5
Insert link/add image
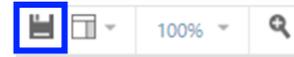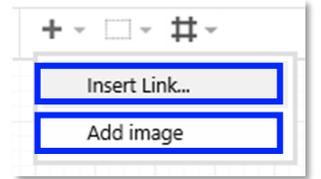
Don't forget to save your changes!!!

Expert
Map end-to-end processes (scenarios)

STEP 1	STEP 2	STEP 3	STEP 4: Option 1	STEP 5: Option 2
Log In	**Create scenario**	**Insert interfaces**	**Develop E2E process**	**Apply roles**

Model Process

Log in with access data received by mail

Model Process House

Go to Navigation Content
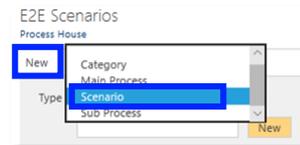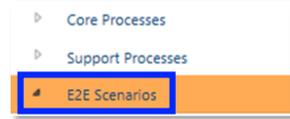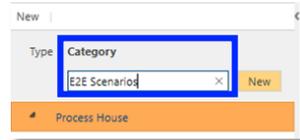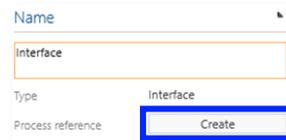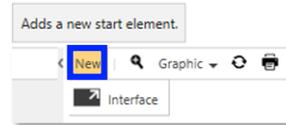
Model end-to-end process by using interfaces to existing processes
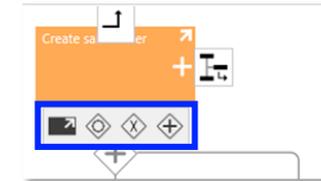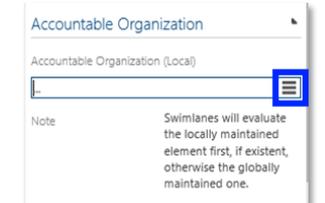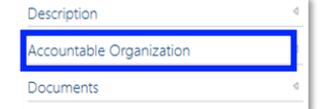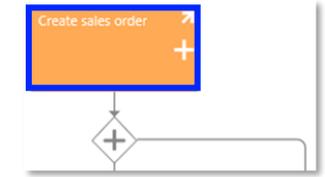
Expert
Assign permissions

Prerequisite: Permission sets are available (created by Admin)
Please note that further Permissions features are available refer to: https://docs.celonis.com/en/celonis-process-management.html

C

STEP 1
Log In

Log in with access data received by mail

Model Process House

Go to Navigation Content

STEP 2
Select process

Use 'Permissions' in Toolbar to assign a specific permission set to a selected process

Also apply for categories or objects if required
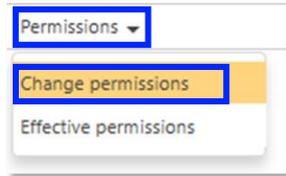
STEP 3
Permit user groups
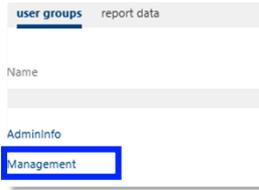
STEP 4
Set permission mode

Choose option whether permissions may be inherited from parent process (or not)

Decide whether permission is exclusive or whether standard set remains unchanged

OR
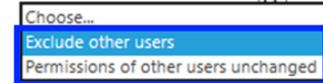
STEP 5
Verify permissions
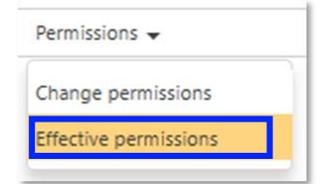
See existing permission rights for a specific user

Expert
Define Customer Journeys

STEP 1
Log In

Log in with access data received by mail

Go to CUSTOMERS navigation

STEP 2
Set up CEM structure

Create a Customer experience management (CEM) consisting of Customer journey maps below
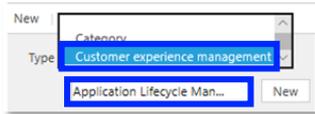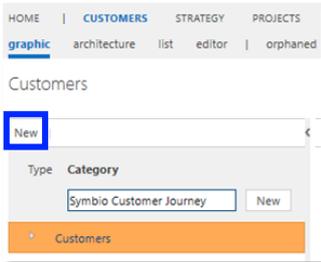
STEP 3
Work out CJM

Design a Customer journey map (CJM) with the help of dropdown objects
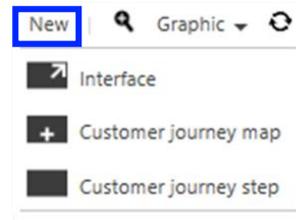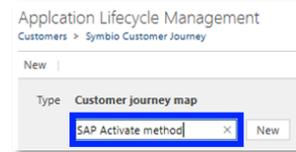
STEP 4
Add information

Create all information that is necessary for the design of a Customer Journey, e.g. points of contact of a consumer with the product, sales paths, participants involved etc.
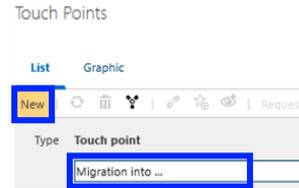
STEP 5
Store information
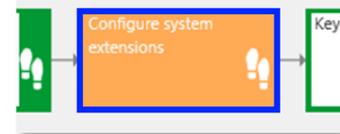
Find out more in our Learnings

BPM Kickstarter
Course